Puzzle
WEALTH SOLUTIONS

Puzzle Clients

Your financial needs are complex and unique.

This chart summarizes the range of your financial picture so that you can participate in building a plan to pursue your financial security.

Investments	Planning	Tax Strategies*	Liabilities	Risk Management	Business	Gifting
Equities	Goals Based Planning	Tax Deferral	Securities Backed Lending	Life Insurance	Exit Planning	Donor Advised Funds (DAFs)
Fixed Income	Cash Flow Modeling	Tax Loss Harvesting	Mortgages	Long Term Care Insurance	Retirement Plans	Charity & Philanthropy
Alternatives	Trust & Wills	Estate Taxes	Bridge Loans	Medicare Plan Evaluations	Key Person Insurance	Appreciated Asset Donation
Real Estate Investments	Corporate Trustee Services	Executive Comp (Options, PSAs, RSUs)		Portfolio Stress Testing	Buy / Sell Arrangements	Family Foundations
	Power of Attorney	Tax Document Delivery		Annuities	Coordination of Professionals	Education / 529s

For illustration purposes only. All products and and services are not offered through Puzzle Wealth Solutions.
*Specific individualized tax advice not provided. We suggest you discuss your specific situation with a qualified tax or legal advisor.